

REQUEST FOR PROPOSALS (RFP)
TO
PROVIDE ENGINEERING AND
ARCHITECTURAL
DESIGN SERVICES TO
REPLACE BOILERS

FOR
AVIARY BUILDING
Milwaukee County ZOO
10001 W. Bluemound Road
MILWAUKEE, WI 53226

PROJECT NO.

Z151-16418

Project No. & Name: Z151-16418 Replace Boilers at Aviary Building, Zoo

Date: February 02, 2018

To: All Interested Consultants.

Subject: Request for Proposals (RFP) To Provide Professional Engineering & Architectural Design Services:

Project No. & Name: Z151-16418 Replace Boilers at Aviary Building.

LOCATION: 10001 W. Bluemound Road,
Milwaukee, WI. 53226

Section I -Introduction:

This Request for Proposal (RFP) is authorized by the director of Administrative Services for Milwaukee County. This RFP is a request for engineering and architectural consulting design services to replace three (3) Boilers at Aviary Building in Milwaukee County Zoo.

Your services will include Schematic Design through Construction Administration by way of this RFP. The construction budget for this project (exclusive of planning and engineering costs) is approximately \$240,000 for replacement of existing boilers system.

As part of design process the consultant will investigate innovative energy saving alternatives for existing HVAC system with a base design similar to existing system, and will on the behalf of Milwaukee County, apply for any applicable Focus on Energy incentives/ rebates.

The objectives of this design project includes the following:

Project Design Phase:

- Programming Phase
- Schematic Design
- Design Development
- Construction Documents
- Bidding Phase
- Construction Phase

Section II -General Requirements of Consultant:

The consultant shall provide complete and comprehensive engineering/ architectural design services, which will include verifying existing site conditions, code review for plan compliance with local, state and federal rules and regulation, adherence to sustainable design practices and identifying necessary and /or incidental issues that will

mitigate problems and /or risks throughout that course of the project. The consultant must provide Milwaukee County with final plans stamped and signed by the responsible engineer/ architect with their Wisconsin Registration Seal(s). Refer to the Type "A" agreement accompanying this document to find additional information regarding contract requirements for Milwaukee County Professional Services.

SECTION III - GENERAL DESCRIPTION:

The current Boiler system is 24 years old and needs constant repair. Replace existing boilers along with all necessary electric, plumbing, combustion air intake, exhaust gas venting, controls and monitoring by "Metasys". The consultant shall evaluate heating load to figure out correct size and design for new boilers.

As an Alternate consultant shall also evaluate the existing cooling system to figure out correct size and design for replacement of existing cooling system along with investigation of the cause as well as remedy for excess moisture in this building.

The performance of this design will require examination of existing records, drawings and other written documents. It is an explicit requirement of this RFP that the consultant staff perform this "document examination". Project specifications shall describe the sustainable design elements that are to be incorporated in the various sections of the project. The Consultant shall evaluate sustainable design alternatives, where applicable to determine the feasibility of incorporating those alternatives into the project. The evaluation shall include a comparison of construction costs, annual operating cost, and other non-fiscal benefits of each option considered. As part of your proposal, provide examples of what alternatives you plan to evaluate. Accordingly, your proposed budget should include level-of-effort corresponding to the scope.

Milwaukee County expects to participate in all applicable Focus on Energy and WE Energies incentive programs that may apply to designs resulting from this project to extent that they are known at this point in time. The selected consultant shall be expected to advise Milwaukee County of any programs that presently apply and to support the county in exploring and qualifying for these programs.

The consultant will recommend retrofits that fit the currently estimated construction funding of \$240,000 for upgrading existing boiler system.

The construction of alternate proposal to replace existing cooling system and remedy excess moisture will be subject to approval of additional funding. The consultant will also provide construction budget for alternate proposal.

Section IV – Scope of Basic Services :

Based upon the Schematic Design Phase solution, the consultant will be responsible for the preparation of Construction Bidding Documents, Bidding, and Bid Negotiation assistance, and limited Construction Phase Services, which may include Shop Drawing review, review of manufacturer's materials and products submittals, review of samples submittals from the contractor.

The consultant is required to assure the Owner that the results of the Contractor's work is in strict accordance with the plans and specifications, which are a part of the Contract Documents for Construction.

The consultant shall revise the original contract Documents, including the plans and specifications, as required, to produce Record Documents of the construction work, which will be given to the Owner after certification of Substantial Completion.

Attached, please find a copy of Milwaukee County Department of Administrative Services- Stipulated Sum (Lump Sum) Standard Prime Consultant Agreement for Professional Services (Type "A" Agreement). The scope of basic services specified in Article 3: Basic Services of the attached Agreement for each of those six (6) phases, include the services below as a part of those basic services:

Section 1.01 Programming & Schematic Design Phase:

From interviews, research, and study of the owner's needs, the consultant shall prepare a program and an estimate of probable construction costs for the project as described in the attached consultant agreement.

Required deliverables shall include but are not limited to the following:

- a) **Schematic design plan and program description for Base & Alternate proposals**
- b) **Cost estimate for construction segments of Base & Alternate designs**

SCHMATIC DESIGN PHASE :

The Consultant shall meet with the Department of Architects and Engineering, the Department of Facilities Management (Owners). Visit the project site and verify documents and existing drawings with existing site conditions.

Review and verify the design program provided by the Owners and revise or update the program as necessary to meet the Owners current needs and expectations for the new upgraded heating and cooling systems.

Prepare Schematic Design that meets the program requirements, The Schematic Design shall include as necessary, studies consisting of drawings and other documents illustrating the scale and relationship of the project components, including the envelope, energy calculations, as may be appropriate for a completed, operational, functioning building, Upon approval by the Owner of the Schematic Design documents and a Statement of Probable Construction Cost submitted by the consultant this phase of services is complete.

Design Development Phase :

The Consultant shall prepare more detailed drawings and other data relating to updated building heating system , electrical systems and other essentials. The Consultant shall submit an updated statement of Probable Construction Cost. When the owner approves these documents, this phase is complete.

Construction Documents Phase:

Prepare drawings and specification describing, in technical detail, the construction contract work to be done – materials, equipment and workmanship required for Heating system and cooling system along with architectural, structural, mechanical and electrical work – and related site work, utility connections, and special equipment installations. The consultant will also assist the Owner in preparing information for bidders, bidding, and proposed contract forms.

the Contract covering responsibilities during construction. The Consultant will advise the Owner of any adjustments to previous Statements of Probable Construction Cost, as well. When the Owner approves these documents, this phase is complete.

Bidding Phase:

Advise the Owner about the qualifications of prospective contractors and assist, as may be required, in obtaining bids.

Construction Phase :

- 1) Prepare supplementary drawings when required to clarify the consultant's design intent.
- 2) Review the Contractor's Schedule of Values; review of fabricators' and suppliers' shop drawings, material samples and equipment, and other required submissions.
- 3) The consultant shall attend biweekly jobsite meetings and make periodic visits to the jobsite to review the progress and quality of Work to determine if the Work is proceeding in accordance with the Contract Documents.
- 4) The consultant shall provide a substantial completion observation of the installation and develop a final punch list for the project, collect operations & maintenance manuals, warranties, as built marked up drawings and other close out documents from the installing contractor and reproduce a digital & hard copy of as built drawings from marked up drawings and submit to Milwaukee County for project close out.
- 5) Review of the Contractor's applications for payment, determine that amounts invoiced are in reasonable agreement with Schedule of Value and invoiced amounts.

In addition to the documentation requirements for each phase of work as noted in the attached agreement for professional services, the consultant will be required to provide a zip disk in Microsoft Word 2000 format, containing all relevant project documents they prepared during each phase of the project. Those documents will include all correspondence, transmittals, etc. to Milwaukee County, other agencies, and sub-consultants

Section V - Tentative Schedule:

The schedule shown below is based on the extent of basic design services up to Construction Administration:

- 1) RFP completed: February 09 , 2018
- 2) RFP approved: February 14, 2018
- 3) RFP publicly advertised: February 16 , 2018
- 4) Pre-Proposal Meeting February 28, 2018, 10:00 A.M. at 10001 W. Bluemound Road, Milwaukee, WI. 53226 (Meet in Cafeteria of Administration Building near Main Entrance)
- 5) Attendance at the pre-proposal meeting is mandatory.
- 6) Proposals due : March 14, 2018
- 7) Select consultant March 21 , 2018
- 8) Consultant agreement signed and Notice to Start April 02, 2018
- 9) Bid documents ready by June 28 , 2018
- 10) Begin Construction : August 15 , 2018
- 11) Substantial Completion of Construction : December 10, 2018

VI – Proposal Content:

Each proposal shall contain information in the following areas:

- A. Cover: Include project number and name, project location, proposal title (Proposal for Professional Services), Consultants name, address, telephone number, FAX number, proposal date, etc.
- B. Table of Contents: Include a clear identification of the material by section and by page number.
- C. Letter or Transmittal: Limited to two pages, briefly state the bidder's Understanding of the service to be provided and a positive commitment to perform the services as defined in the RFP.
- D. Organization Description: A brief description of the organization submitting the Proposal. Include the name, size, legal status (corporation, partnership, etc.), professional registration / certification, major type of activity or areas of consulting. The organization must be licensed to operate in the State of Wisconsin. Include a copy of current license, certification or registration.
- E. We are looking for a consultant that has proven experience in similar types Of projects as well as green building and sustainable design practices. Include list of similar projects that the organization has participated on in the past five (5) years. Attach a separate sheet for each project, up to five (5) maximum, giving a brief description of each project and the organization's participation.

- F. Project Organization and Staff Experience: Include an organizational structure of the project team, including the relationship of the sub-consultants to be used for this project. The name of the Principal in Charge of this project along with their Professional Architect(s) and Engineer(s) Registration Number(s) in the State of Wisconsin must be clearly indicated in this section of the proposal, along with the name, occupation and title of the Project Manager who will be in charge of this project. Provide a resume' for each individual involved in the project, and include their names, title and /or duties for the project, professional registration, a brief description of the qualifications and related experience including time contribution in this capacity on past projects.
- G. Alternate Principal in Charge: Include the name of an Alternate Principal in Charge in the event that the originally declared Principal in Charge is not able to fulfill their duties. Milwaukee County Department of Administrative Services also reserves the option to select an Alternate Principal in Charge.
- H. Sub-Consultants: Indicate the names and addresses of any sub-consultants and/or associates proposed in this project. State in what capacity they would be used and approximate percentage of the total services they would provide. Also state their past experience in the field.
- I. Project Approach: Provide a description of the engineering, environmental and public involvement problems you anticipate in this project and how you propose to overcome them.
- J. Scheduling: Provide a bar chart form schedule indicating a sequenced, timetable with relationship, which are necessary to complete the project, based on the schedule as noted in Section IV – Project Schedule, of this RFP.
- K. DBE Requirements: Milwaukee County's policy is to achieve twenty five percent (25%) Targeted Business Enterprise (TBE) participation in the Professional services work to be performed by them. For assistance, contact CBDP office at 278-5104.
- M. Equal Opportunity Employer: The consultant and all associated consultant(s) must be indicated in that section of the Proposal.
- N. Fee Proposal: The fee for this project shall be clearly stated as lump sum for basic services as detailed in this document for Base & Alternate proposals separately. Progress payments for those service will be made as stated in the attached professional services agreement. Include a copy of Attachment B-1" of the attached professional services agreement in this part of the proposal to indicate the direct salary rates, fixed overhead rates, etc. for any additional services that may be required.

Section VII - Proposal Submission Requirements and Format:

The Proposal must be submitted by March 14, 2018, at 2:00 P.M. to:

Milwaukee County Department of Administrative Services
Architecture and Engineering Division
633 W. Wisconsin Avenue, St. 1000
Milwaukee, Wisconsin 53203
Attention: Vijay Mehta, Sr. Mechanical Engineer

- A. Five (5) copies of the Proposals must be submitted in a sealed envelope only. No other container is acceptable.
- B. Each envelope must be identified with the submission date, RFP number, project number and title, and name and address of the submitting party. Envelopes which are not properly identified or received after time and date as noted in Section VI – A, above will be rejected.
- C. Proposals must respond to each component as listed in Section VI – Proposal Content, in order as presented and in the form or format as requested. Each response must identify the heading and must respond entirely to each segment without reference to any other part of the Proposal.
- D. The proposal must be submitted in a single bound 8-1/2" X 11" document.
- E. In order to expedite the Agreement award process, each Prime Consultant is to completely fill in and include the attached Stipulated (Lump Sum) Standard Prime Consultant Agreement for Professional Services Type "A" Agreement. Insurance forms as required per the agreement will be required from the Successful consultant only.

Section VIII - Proposal Evaluation / Consultant Selection:

- A. The evaluation team will be made up of three (3) to (5) individuals with Technical knowledge of the requirements, and familiarity with the project.

Selection of the Consultant(s) will be made entirely on the basis of the items Requested in the RFP and as addressed in the Proposals.

The evaluation may include an interview of a short list of up to three (3) finalists. However, an award may be made without this interview. The interview will be evaluated 40% on the previous qualification rating, as well as fee and the response to the project requirements.

Section IX -Miscellaneous:

- A. Milwaukee County reserves the right to decide, at its sole discretion, to reject any or all proposals, issue addenda, request clarifications, waive technicalities, alter the nature and / or scope of the proposed project, request submittals, and/or discontinue this process.
- B. All proposals should use this RFP and its attachments as the sole basis for the proposal.
- C. The issuance of a written addendum and the pre-submission meeting are the only official methods through which interpretation, clarification or additional information will be given.
- D. Proposals will not be opened in public and all materials submitted will not be returned.
- E. This is an RFP, not a bid. Therefore, Milwaukee County is not bound to accept the lowest fee for professional services as the basis for selection.
- F. All cost and/or expenses for preparing a proposal, attending the selection interview, if required, or supplying additional information requested by Milwaukee County is the sole responsibility of the submitting party.
- G. With the signing and submission of a statement or proposal the submitting consultant certifies that the standard terms and conditions of the Agreement for Professional Services (that will be used to contract with the selected consultant) has been read and understood and that the submitting consultant is ready, willing and able to sign the agreement when requested without making any substantive changes.
- H. The successful consultant and/or any contractor affiliated with the prime consultant shall be prohibited from submitting bids in the construction bidding process for this project.
- I. The successful consultant must be an Equal Opportunity Employer.
- J. Bidders shall follow Milwaukee County Code of Ethics as follows: No person(s) with a personal financial interest in the approval or denial of a Contract being considered by a County department or with an agency funded and regulated by a County department, may make a campaign contribution to any County official who has approval authority over that Contract during its consideration. Contract consideration shall begin when a Contract is submitted directly to a County department or to an agency until the Contract has reached final disposition, including adoption, County Executive action, proceeding on veto (if necessary) or departmental approval.

K. All questions regarding this RFP shall be directed in writing to:

Milwaukee County Department of Administrative Services
Architecture and Engineering Division
633 W. Wisconsin Ave., St. 1000
Milwaukee, Wisconsin 53203

Telephone: (414) 278-4743 Fax: (414) 223-1366
Internet Email: Vijay.Mehta@milwaukeecountywi.gov

Attention: Vijay Mehta, P.E.
Sr. Mechanical Engineer

Sincerely,

Vijay Mehta
Sr. Mechanical Engineer

Attachments:

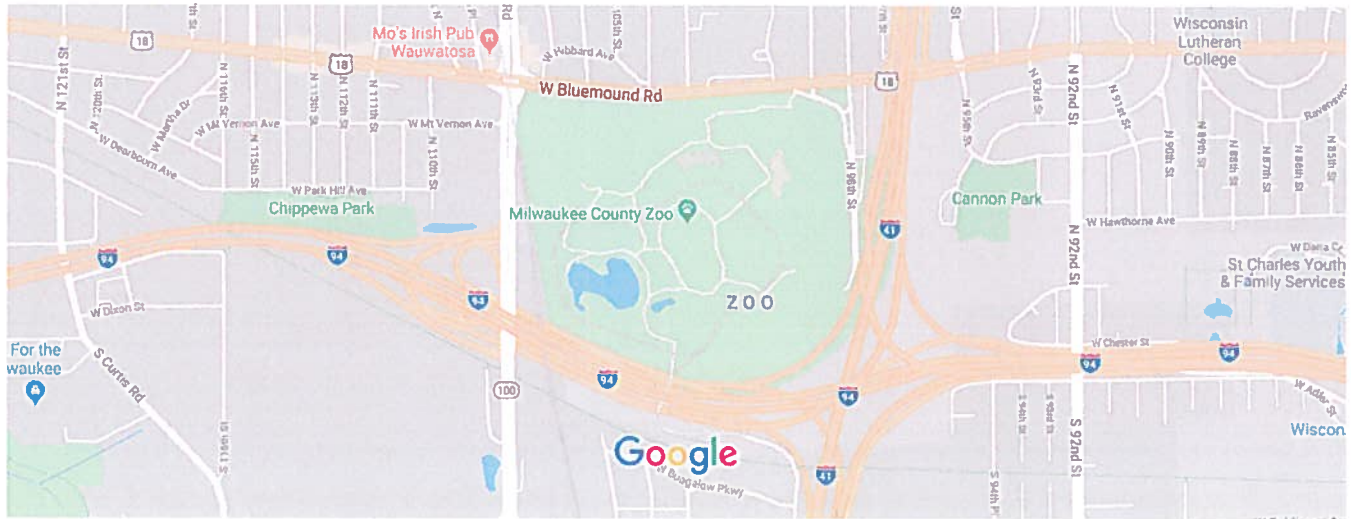
1. Project Location Map
2. Proposal Preparation, Submission and Evaluation
3. Consultant Proposal Form
4. TBE Forms
5. Standard Prime Consultant Agreement for Professional Services (Type "A")

cc w/o attachments:

G. High, Das A&E
Brian Engel, CDBP
John Westrich, Zoo

ATTACHMENT 1
PROJECT LOCATION MAP

Google Maps



Map data ©2018 Google 1000 ft

MAP LEGEND

Legend Key

- ★ Animals in Action
- ATM U.S. Bank Auto Teller
- ⚡ Change Machine
- ➕ First Aid
- ☺ Food
- 🎁 Gifts
- ♿ Handicap/Changing Station
- 📖 Information
- 👶 Lactation Suites
- 👦 Lost Children's Area
- 🛒 Merchandise Cart
- 🏠 Mold-a-Rama
- 📰 Penny Press
- 📷 Photo Booth
- 🍽️ Private Picnic Areas
- 🚻 Restrooms
- 🍌 Snacks
- 🏠 Wilderness Resort
- 🛠️ Stroller Rentals
- 🏠 Tornado Shelter (U.S. Bank Gathering Place in Restrooms)

Zoo Rides

- 🎠 Penzeys Spices Carousel
- 🚂 North Shore Bank Safari Train
- 🚗 Sky Safari*
- 🚗 Tri City National Bank Sky Trail® Ropes Courses & Zip Line*
- 🚗 Meijer Zoomobile*

Zoo Gift Shops

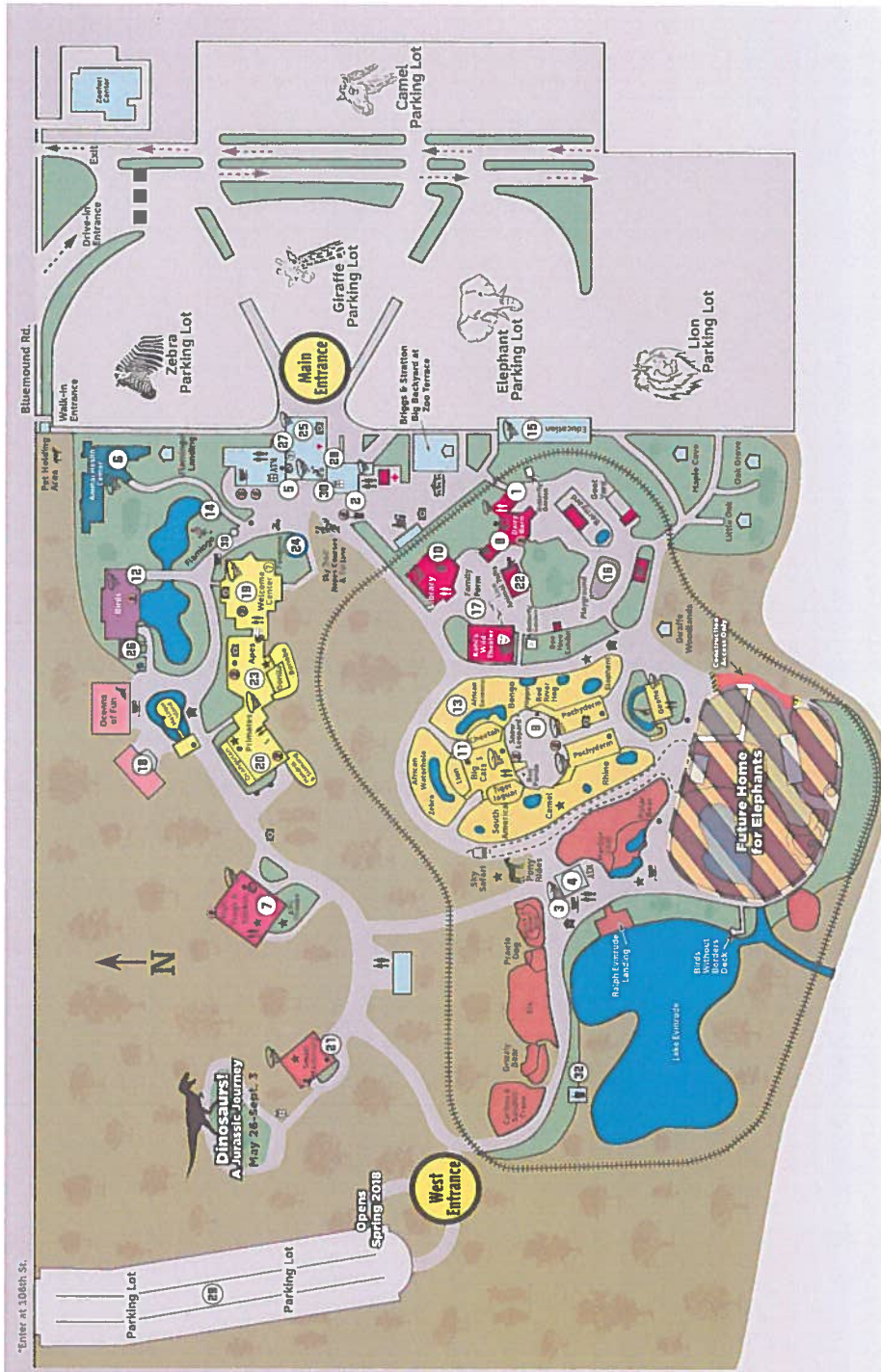
- 🛍️ Flamingo Gifts
- 🛍️ Zoo Gift Shop

Zoo Food

- 1 Dairy Store*
- 8 Depot Snack Shop
- 3 The Coop
- 6 Lakeview Place (ATM/Restroom access only)

Buildings

- 6 Animal Health Center
- 7 Aquatic & Reptile Center (ARC)
- 8 Dairy Complex
- 9 Dohmen Family Foundation Hippo Home
- 10 Family Farm and Marketing & Communications Office
- 11 Florence Mila Borchert Big Cat Country
- 12 Herb & Nada Mahler Family Aviary
- 13 Holtz Family Impala Country
- 14 Isabel Wilmut Borchert Flamingo Exhibit and Overlook Education Center
- 15 Karen Peck Katz Conservation Education Center
- 16 Thrivent Mutual Funds Playground
- 17 Northwestern Mutual Family Farm
- 18 Otto Borchert Family Special Exhibits Building
- 19 Peck Welcome Center
- 20 Primates of the World
- 21 Small Mammals Building
- 22 Stackner Animal Encounter
- 23 Stearns Family Apes of Africa
- 24 Taylor Family
- 25 Humboldt Penguins
- 26 U.S. Bank Gathering Place
- 27 Whooping Cranes
- 28 Zoo Administration Office
- 29 Zoological Society Office
- 30 Auxiliary West Entrance & Parking



Milwaukee County Zoo
10001 W Bluemound Rd.
Milwaukee, WI 53226
milwaukeezoo.org
414-771-3040



The Milwaukee County Zoo and its operating agencies adhere to the ADA. We request 72 hours advance notice to an event to accommodate visitors with disabilities. Please call the Zoo at 414-771-3040 for the necessary arrangements.

The Zoo is a smoke-free attraction (including E-cigarettes and vaporizers). Smoking is allowed only in the Zoo parking lots.

*Closed for the season

Replace Boilers at Aviary Building in Zoo
Z151-16418

ATTACHMENT 2

PROPOSAL PREPARATION, SUBMISSION AND
EVALUATION GUIDELINES

PROPOSAL PREPARATION, SUBMISSION & EVALUATION

I. Explanation to Prospective Offerors

Any prospective offeror desiring an explanation or interpretation of this RFP must request it in writing no later than seven business days before the last date for submission of proposals. Requests should be directed to the individual in charge at the address listed in the RFP. Any information given to a prospective offeror concerning a solicitation will be furnished promptly to all other prospective offerors as an amendment to the RFP, if that information is necessary in submitting offers or if the lack of it would be prejudicial to any other prospective offerors.

II. Complete Proposals

Proposals shall represent the best efforts of the offerors and will be evaluated as such. Proposals must set forth full, accurate, and complete information as required by this section and other sections of this RFP.

III. Unnecessarily Elaborate Proposals

Brochures or other presentations beyond those sufficient to present a complete and effective response to this solicitation are not desired and may be construed as unnecessarily elaborate and an indication of the offeror's lack of cost consciousness. Elaborate art work, expensive paper and binding, and expensive visual and other presentation aids are neither necessary nor desired. Concise and clear proposals are sought.

IV. Retention of Proposals

All proposal documents shall be retained by the County and therefore, will not be returned to the offerors. The County will not pay for preparation of proposals or for proposals that are retained by the County.

V. Examination of Proposals

Offerors are expected to examine the Site, Statement of Work and all instructions and attachments in this RFP. Failure to do so will be at the offeror's risk.

VI. Legal Status of Offeror

Each offeror must provide the following information in its proposal:

- A. Name of the offeror;
- B. Whether offeror is a corporation, joint venture, partnership (including type of partnership), or individual;

- C. Copy of any current license, registration, or certification to transact business in the State of Wisconsin if required by law to obtain such license, registration, or certification. If the offeror is a corporation or limited partnership and does not provide a copy of its license registration, or certification to transact business in the State of Wisconsin, the offeror shall certify its intent to obtain the necessary license, registration or certification prior to contract award or its exemption from such requirements; and
- D. Copies of any current license, registration or certification required in RFP;
- E. If the offeror is a partnership of joint venture, names of general partners or joint venturers.

VII. Organization of Offeror

Each proposal must further contain a chart showing the internal organization of the offeror and the numbers of regular personnel in each organizational unit.

VIII. Offerors Authorized Agent

Each proposal shall set forth the name, title, telephone number, and address of the person authorized to negotiate in behalf of the offeror and contractually bind the offeror, if other than the person signing the proposal.

IX. Price Schedule Submission

Offerors are to submit prices for each item identified in the Proposal. Offers for services other than those specified will not be considered. The prices set forth in the schedule will be used for evaluation purposes and for establishing a contract price. Milwaukee County reserves the right to accept or reject any and all Proposals.

X. Certification and Representations

Offerors shall return with their proposal resumes and any other documents as may be requested in the RFP.

XI. Signing of Offers

The offeror shall sign the proposal and print or type its name on the form. Erasures or other changes must be initialed by the person signing the offer. Offers signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the County.

XII. Proposal Guarantee

By submitting a proposal the offeror guarantees that it will keep its initial offer open for at least 60 days.

XIII. Acknowledgement of Amendments

Offerors shall acknowledge receipt of any amendment to this solicitation by signing and returning the amendment or by letter or telegram including mailgrams. The County must receive the acknowledgment by the date and time specified for receipt of offers. Offeror's failure to acknowledge an amendment may result in rejection of the offer.

XIV. Late Proposals and Modifications and Withdrawals of Proposals

Any proposal received at the office designated in the solicitation after the exact time specified for receipt will not be considered.

XV. Proposal Evaluation Criteria

Following a list of general criteria which will be used to evaluate the proposals:

- a. Quality and responsiveness to the RFP. Weight: 20%
- b. Project approach and understanding, including strategy to perform requested work and time schedule. Weight: 30%.
- c. Qualifications and experience. Weight: 35%
- d. Fee and hourly rates. Weight: 15%.

XVI. Staffing

Consultant shall provide, at its own expense, all personnel required in performing the services under this agreement. Such personnel shall not be employees of Owner.

The offeror must describe his or her qualifications and experience to perform the work described in this RFP. Information about experience should include direct experience with the specific matter and similar facilities. Areas of expertise of each proposed staff member shall be provided (i.e., engineering, economics, architecture, planning). Specific examples of similar or related projects previously conducted shall cite:

- Name of client organization
- Name, address, and current telephone number of client contact person
- Contract number and inclusive dates
- Contract amount

Offeror shall provide the following information for every resume:

- Full name

Replace Boilers at Aviary Building in Zoo
Z151-16418

- Title and areas of specialty
- Affiliation (that is, staff of offeror or sub consultant)
- Experience directly related to the proposed project
- Education/training
- Individual personnel hours and percentage of total project time which will be devoted to the proposed project in total and broken down by task. (See suggested matrix below)
- Resumes shall be included for all personnel expected to work on the project. Only resumes of staff or sub consultant staff employed by or under contract with the firm as of the date of proposal submission are to be included.

Replace Boilers at Aviary Building in Zoo
Z151-16418

TASK	NAME OF EMPLOYEE 1	NAME OF EMPLOYEE 2	ETC.....	EXPENSE S	SUB TASK	TASK TOTAL
	HOURLY RATE W/OH	HOURLY RATE W/OH	ETC.....		TOTAL	
DESCRIPTION						
1. TASK 1	Number of Hrs/Task	Number of Hrs/Task				
2. TASK 2						
3. TASK 3						
4. TASK 4						
5. TASK 5						
6. TASK 6						
TOTAL HOURS						
TOTAL COST						
% OF TIME						

TOTAL FEE

Replace Boilers at Aviary Building in Zoo
Z151-16418

ATTACHMENT 3
CONSULTANT PROPOSAL

Replace Boilers at Aviary Building in Zoo
Z151-16418

Page 1 of 1

MILWAUKEE COUNTY
DEPARTMENT OF Administrative Services
ARCHITECTURE AND ENGINEERING DIVISION

PROJECT: Replace Boilers at Aviary Building in Zoo
Z151-16418

CONSULTANT PROPOSAL

I. Base Proposal - BASIC SERVICES (Include services of all needed sub consultants)

A. "LUMP SUM" fee for schematic design through construction administration: \$
(_____)

II. Alternate Proposal - BASIC SERVICES (Include services of all needed sub consultants)

A. "LUMP SUM" fee for schematic design through construction administration \$
(_____)

V. PRINCIPAL IN CHARGE

Name of Principal

Engineer's Registration No. in Wisconsin

Flat hourly rate for principal

Participation of Disadvantaged Business Enterprises at the rate of 10% will be required.

Firm Name

Authorized Signature

Title

Date

Replace Boilers at Aviary Building in Zoo
Z151-16418

ATTACHMENT 4

TARGETED BUSINESS ENTERPRISE (TBE)
INSTRUCTIONS & FORMS

TARGETED BUSINESS ENTERPRISE (TBE) REQUIREMENTS

Community Business Development Partners (CBDP) is responsible for monitoring and enforcing the Milwaukee County Target Enterprise (MCTE) Ordinance for inclusion of small business. Target firms include DBE firms certified under the Wisconsin Unified Certification Program following Federal regulations, WBE and MBE certifications from the State of Wisconsin DOA, SBE firms certified by Milwaukee County, and SBE firms meeting SBA size standards and listed in the SAM directory.

Targeted Business Enterprise (TBE) participation goal for this RFP is 17%. To be considered, you must submit signed *Commitment to Contract with TBE* (TBE-14) forms, one for each of the TBE firms included to meet participation. TBE-14 form(s) must identify (1) the TBE firm by name and address, (2) the scope of service(s) to be provided, (3) the dollar amount and (4) the percentage. The form is first completed and signed by the Prime, then forwarded to the TBE subconsultant for signature in the affirmation section. Signatures must occur in the proper date order sequence, or the form may be considered non-responsive. CBDP is entitled to reject your Proposal for improperly completed forms.

CBDP may be contacted at 414-278-4851 or cbdpcpliance@milwaukeecountywi.gov for assistance in identifying TBE firms and understanding the County's TBE Program.

Following are the links to Directories for firms eligible for credit:

DBE <http://wisconsin.gov/Pages/doing-bus/civil-rights/dbe/certified-firms.aspx>

MBE WBE <http://www.doa.state.wi.us/Divisions/Enterprise-Operations/Supplier-Diversity-Program>

Milwaukee County SBE <https://mke.diversitycompliance.com/Default.aspx>

SAM Directory for Federal SBE <https://www.sam.gov/portal/SAM#1>

Adherence with prompt payment requirements is monitored through information entered into the Diversity Management and Compliance System, utilizing B2GNow software. Prime consultants are required to report payments received from the County and amounts paid to subconsultants. Subs will receive an automated email requesting them to confirm the amounts and whether the terms of the prompt payment policy were complied with. There is no cost to the Prime or any subconsultant, the only requirement is to become a registered user and complete the one hour webinar training. The County will enter the Primes contract, and the Prime will enter all subconsultants, including both TBE and non-TBE firms.



COMMUNITY BUSINESS DEVELOPMENT PARTNERS MILWAUKEE COUNTY

COMMITMENT TO CONTRACT WITH TBE

PROJECT No. _____ PROJECT TITLE _____

TOTAL CONTRACT AMOUNT (less allowances) \$ _____ TBE Goal: _____

Name & Address of TBE	Scope of Work Detailed Description	TBE Contract Amount	% of Total Contract

Bidder/Proposer Commitment (To be completed by firm committing work to TBE)

I certify that the TBE firm quoted the identified service(s) and cost(s). I further acknowledge our firm having negotiated with, and having received confirmation, on partnering, pricing and delivery from the TBE firm listed herein.

Prime Contractor/Consultant _____ Phone _____, or one of our subs, will enter into contract with the TBE firm listed, for the service(s) and amount(s) specified when awarded this contract. The information on this form is true and accurate to the best of my knowledge. I further understand that falsification, fraudulent statement, or misrepresentation will result in appropriate sanctions under applicable law.

Signature of Authorized Representative

Name & Title of Authorized Representative

Date

TBE Affirmation (To be completed by TBE Owner/Authorized Representative)

- I affirm that our company is certified as (check all certifications that apply)
_____ DBE by the Unified Certification Program certifying partners
_____ MBE by State of Wisconsin DOA
_____ WBE by State of Wisconsin DOA
- I acknowledge and accept this commitment to contract with my firm for the service(s) and dollar amount(s) specified herein, as put forth by (Prime or sub) _____.
- I understand and accept that this commitment is for service(s) to be rendered in completion of the project specified herein and all work is to be completed with my own forces.
- I affirm that approval from CBDP will be obtained prior to subletting any portion of this work awarded to my firm on this project.
- I affirm that the Wisconsin UCP has certified our company as a DBE, and that our company is currently listed in the Wisconsin UCP Directory or we are certified as a MBE or WBE with the State of Wisconsin DOA.

Signature of Authorized TBE Representative

Name & Title of Authorized TBE Representative

Phone Number

Date

FOR CBDP USE ONLY

Commitment number ____ of ____ Participation: _____ Project Total: _____

Authorized Signature

Date



COMMUNITY BUSINESS DEVELOPMENT PARTNERS MILWAUKEE COUNTY

COMMITMENT TO CONTRACT WITH TBE

ADDITIONAL INFORMATION & REQUIREMENTS:

1. The Directory of Certified DBE firms eligible for credit toward the satisfaction of participation will be found at the following link, and can be searched by Name and/or NAICS code.

<http://wisconsindot.gov/Pages/doing-bus/civil-rights/dbe/certified-firms.aspx>

The Directory of MBE and WBE firms certified by the State of Wisconsin DOA eligible for credit toward the satisfaction of participation will be found at the following link:

<http://www.doa.state.wi.us/Divisions/Enterprise-Operations/Supplier-Diversity-Program>

2. **CONTRACT ADJUSTMENTS:** The successful Bidder/Proposer will maintain the approved TBE participation level during the term of the contract with the County, including any additional work on the contract, e.g., change orders, addendums, scope changes, or fee increases.

3. **WRITTEN CONTRACTS WITH TBE:** The County requires that the successful Bidder/Proposer enter into contract, directly or through subs, as stated in this form. Agreements must be submitted to the County within 7 days of receipt of the Notice-To-Proceed. By executing this commitment, you are certifying that you have had contact with the named TBE firm and that they will be hired if you are awarded the contract by the County.

4. **SUBSTITUTIONS, TBE SUBCONTRACTING WORK, TRUCKING FIRMS:** The successful Bidder/Proposer must submit written notification of desire for substitution to the TBE affected, and send a copy to the County, stating the reason(s) for the request. The TBE will have five (5) business days to provide written objection/acceptance of the substitution. The "right to correct" must be afforded any TBE objecting to substitution/termination for less than good cause as determined by the County. Approval must be obtained from the County prior to making any substitutions. TBE firms are required to notify and obtain approval from the County prior to seeking to subcontract out work on this project. In the case of TBE trucking firms, credit will be given for trucks leased from other TBE firms; however, if the TBE leases trucks from non-TBE firms, the commission or fee will be counted for crediting.

5. **REQUESTS FOR PAYMENT:** The successful Bidder/Proposer must indicate on the Continuation Sheet (AIA form G703, or equivalent) or invoice for consulting the work being performed by TBE by either a) placing the word "TBE" behind the work item or b) breaking out the work done by TBEs at the end of the report. The successful Bidder/Proposer shall notify TBE firms of the date on which they must submit their invoices for payment.

6. **TBE UTILIZATION REPORTS:** The successful Bidder/Proposer will enter payments to subs and suppliers directly into the County's online reporting system on a monthly basis. These entries will cover payments made during the preceding month and will include zero dollar (\$0) entries where no payment has occurred.

If you have any questions related to Milwaukee County's TBE Program, please contact:

414.278.4751 or cbdpcompliance@milwaukeecountywi.gov